



Live Questions

During this presentation, email questions with subject line "ICN" for live response to:

ClaimsAdmin@IowaSchoolMicrosoftSettlement.com





Form

Claims Administrator Iowa School Microsoft Settlement P.O. Box 195 Minneapolis, MN 55440-0195

EXAMPLE CITY COMM SCHOOL DISTRICT

EXAMPLE CITY, IA 12345 1234

For the benefit of:

JANE DOE

000-0000-0000

PO BOX 1

EXAMPLE CITY ELEMENTARY SCHOOL

123 MAIN ST

Current Voucher Balance: \$30,000.00

Iowa School Microsoft Settlement Voucher Balance Statement PDS = Professional Development Services GPV = General Purpose Voucher SV = Software Voucher SOFTWARE VOUCHER GENERAL PURPOSE VOUCHER Date Action PDS Activity Non-PDS Activity GPV Balance SV Activity SV Balance \$0.00 \$20,000.00 \$0.00 \$20,000.00 07/28/2010 Beginning Balance \$0.00 07/29/2010 Payment \$0.00 \$5,000.00 \$15,000.00 \$1,000.00 \$19,000.00 \$3,000.00 \$0.00 \$12,000.00 \$1,000.00 \$18,000.00 08/03/2010 Payment \$12,000.00 \$18,000.00 08/03/2010 Current Balance

Iowa School Microsoft Settlement Voucher Redemption Form

EXAMPLE CIT	YELEMENTARY	SCHOOL
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To redeem your vouchers:

- 1. Detach and complete the Voucher Redemption Form for the specific eligible school. Indicate the dollar amount claimed for each of the vouchers listed for that school. Vouchers may only be redeemed for eligible products and/or services purchased between August 17, 2009, and June 30, 2014. Vouchers cannot be transferred to any person or entity and cannot be transferred between schools or districts.
- 2. Enclose a photocopy of the itemized receipt or vendor invoice for the products and/or services purchased AND circle the items for which you would like to redeem the vouchers.
- 3. Mail to: Claims Administrator, Iowa School Microsoft Settlement, P.O. Box 195, Minneapolis, MN 55440-0195. Forms must be signed by the Superintendent, Business Manager and Building Principal. Forms must be postmarked on or before June 30, 2014.

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Amount Claimed:

General Purpose Voucher

Software Voucher

Authorized Signatures:

I certify that the products and/or services on the proofs of purchase attached to this form were purchased on or after August 17, 2009 for the benefit of this eligible school and have not been and will not be redeemed through another program.

Superintendent:

Signature

Business Manager:

Signature

Date

Building Principal:

Signature

Date



Balance Statement



Claims Administrator Iowa School Microsoft Settlement P.O. Box 195 Minneapolis, MN 55440-0195

EXAMPLE CITY COMM SCHOOL DISTRICT

For the benefit of:

JANE DOE

000-0000-0000

PO BOX 1

EXAMPLE CITY ELEMENTARY SCHOOL

123 MAIN ST

EXAMPLE CITY, IA 12345 1234

Current Voucher Balance: \$30,000.00

Iowa School Microsoft Settlement Voucher Balance Statement

PDS = Professional D	evelopment Services	GPV = General Purpose	Voucher	SV = Software Voucher		
	GEN	GENERAL PURPOSE VOUCHER			SOFTWARE VOUCHER	
Action	PDS Activity	Non-PDS Activity	GPV Balance	SV Activity	SV Balance	
Beginning Balance	\$0.00	\$0.00	\$20,000.00	\$0.00	\$20,000.00	
Payment	\$0.00	\$5,000.00	\$15,000.00	\$1,000.00	\$19,000.00	
Payment	\$3,000.00	\$0.00	\$12,000.00	\$1,000.00	\$18,000.00	
Current Balance			\$12,000.00		\$18,000.00	
	Action Beginning Balance Payment Payment	Action PDS Activity Beginning Balance \$0.00 Payment \$0.00 Payment \$3,000.00	GENERAL PURPOSE VOUCE Action PDS Activity Non-PDS Activity	GENERAL PURPOSE VOUCHER Action PDS Activity Non-PDS Activity GPV Balance Beginning Balance \$0.00 \$0.00 \$20,000.00 Payment \$0.00 \$5,000.00 \$15,000.00 Payment \$3,000.00 \$0.00 \$12,000.00	GENERAL PURPOSE VOUCHER SOFTWARE Action PDS Activity Non-PDS Activity GPV Balance SV Activity Beginning Balance \$0.00 \$0.00 \$20,000.00 \$0.00 Payment \$0.00 \$5,000.00 \$15,000.00 \$1,000.00 Payment \$3,000.00 \$0.00 \$12,000.00 \$1,000.00	

Balance Statement



Claims Administrator Iowa School Microsoft Settlement P.O. Box 195 Minneapolis, MN 55440-0195

EXAMPLE CITY COMM SCHOOL DISTRICT

For the benefit of:

JANE DOE

0000-0000-0000

PO BOX 1

EXAMPLE CITY ELEMENTARY SCHOOL

123 MAIN ST

EXAMPLE CITY, IA 12345 1234

Current Voucher Balance: \$3

\$30,000.00

SV = Software Voucher

Iowa School Microsoft Settlement Voucher Balance Statement

	PDS = Professional D	evelopment Services GPV = General Purpose Voucher					
Date		GENERAL PURPOSE VOUCHER					
	Action	PDS Activity	Non-PDS Activity	GPV Balance			
07/28/2010	Beginning Balance	\$0.00	\$0.00	\$20,000.00			
07/29/2010	Payment	\$0.00	\$5,000.00	\$15,000.00			
08/03/2010	Payment	\$3,000.00	\$0.00	\$12,000.00			
08/03/2010	Current Balance			\$12,000.00			

SOFTWARE	VOUCHER
SV Activity	SV Balance
\$0.00	\$20,000.00
\$1,000.00	\$19,000.00
\$1,000.00	\$18,000.00
	\$18,000.00

Voucher Type

- General Purpose Voucher
 - Hardware
 - Services

30% = Professional Development Services

10% = IT Support Services

- Software
- Specific Category Software Voucher
 - Only specific categories of software



Specific Category Software Voucher

- Specific software categories
 - Operating system
 - Word processing
 - Spreadsheet
 - Presentation
 - Desktop relational database
 - Web-authoring
 - Productivity suite
 - Encyclopedia
 - Server software, including client access licenses



Voucher Redemption Form

Iowa School Microsoft Settlement Voucher Redemption Form

EXAMPLE CITY ELEMENTARY SCHOOL

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0001234567

Amount Claimed:

General Purpose Voucher

\$

Software Voucher

\$

Authorized Signatures:

I certify that the products and/or services on the proofs of purchase attached to this form were purchased on or after August 17, 2009 for the benefit of this eligible school and have not been and will not be redeemed through another program.

Superintendent:

Signature

Date

Business Manager:

Signature

Date

Building Principal:

Signature

Date

Before Making Purchases

- It is the responsibility of the school district to ensure all products and services are:
 - Specifically itemized and approved in the building's application or application addendum
 - Eligible for reimbursement on voucher redeemed (GPV, SV)



Valid Purchase Dates

Invoice dates must be on or between
 August 17, 2009 and June 30, 2014

 Invoice date is the purchase date for voucher redemption purposes



Invoices

- Circle items on the invoice that are claimed for reimbursement.
 - If claiming *all items* on an invoice for reimbursement, circle the total invoice price paid.
 - If claiming *individual items* on an invoice, circle the dollar amount of the products claimed.
 - If only a portion of a purchase is being claimed for reimbursement, clearly indicate the amount claimed on the invoice.
- Prices for products and services must be itemized on the invoices.



Invoices for Services

- For IT Support Services, documentation must show:
 - Name of products procured through this settlement being installed or maintained
 - Number of hours spent on the installation and/or maintenance
 - Hourly rate
 - Date of installation or maintenance



Invoices for Services

- For Professional Development Services, documentation must show:
 - Name and description of PD event
 - Hourly rate
 - Number of hours spent on the PD event
 - Date(s) of the PD event



Redemption Check List

- Original redemption form complete
 - Amount claimed for General Purpose Voucher and for Software Voucher
 - 3 signatures with dates signed
- Invoice dates in redemption period (8/17/09 6/30/14)
- All pages of invoices copied for submission
- Invoices marked to indicate items and values claimed
- Invoice billed to/shipped to is school or district
- Items claimed are eligible
- Items claimed are specified on approved building application
- Contingent product requirements met



Resources

- Program website: http://lowaSchoolMicrosoftSettlement.com
- Customer Service Center
 - -Phone 1-866-591-7245
 - -Email:

<u>ClaimsAdmin@IowaSchoolMicrosoftSettlement.com</u>

